# Heartland | Cash Register Express

PAX Store and Forward Guide

Rev 03/2020

**Heartland** | Cash **Register** Express

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| Date | Doc Version | Author | Summary |
|------|-------------|--------|---------|
| 03/27/2020 | 1.0 | BG | Initial release |

# Overview

PAX **Store and Forward** (SAF) offers merchants the ability to continue business operations in the case of internet loss or loss of connection with the credit processor. You can easily enable or disable this function in CRE settings. PAX also offers controls to help balance loss mitigation with business sales.

# Requirements

‣ Must be running CRE 13.1012 or higher
‣ Must be using a PAX S300 Pinpad (cannot be used in conjunction with UIC tablet)
‣ Must process credit cards via Heartland
‣ Must have these Heartland credentials:

- License ID
- Site ID
- Device ID
- User Name
- Password

**Please note:** By opting to use **SAF**, merchants acknowledge and accept the risk of financial loss resulting from offline processing since there is no guarantee that stored transactions will be approved.

# Setup Instructions

## Configure SAF in PAX BroadPOS

In order to process offline, PAX devices must be configured as described here:

‣ **Allow Store&Forward**: Enabled
‣ **SAF Mode**: Offline On Demand
‣ **SAF Upload Mode**: Silent Auto Upload
‣ **Delete SAF Confirmation**: with Prompt
‣ **Auto Upload Interval Time**: 100

Other settings such as **Ceiling** amounts and **HALO** amounts can be set based on the merchant's requirements. These controls will allow a cap to be put on offline sales, either per transaction, or total for the day.

If you have any questions about this process, or require assistance verifying settings, please contact PAX Support or Product Ops Integration.
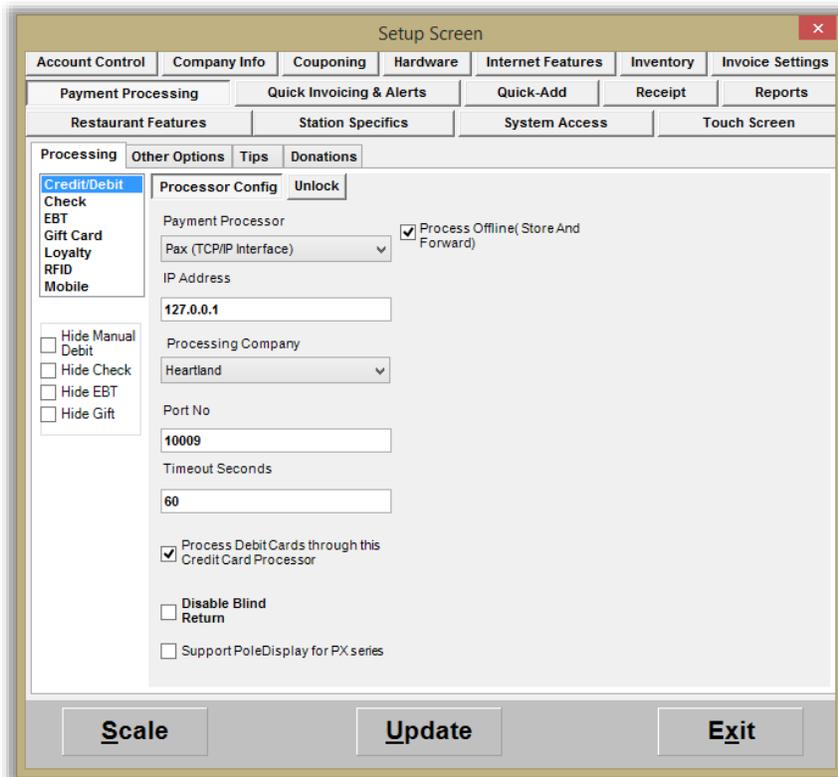
## Enable / Disable SAF in CRE

**Switch to Offline**

**1**   Select **Manager** or **Options** and enter credentials if prompted.

**2**   Select **Setup | Setup Screen**.
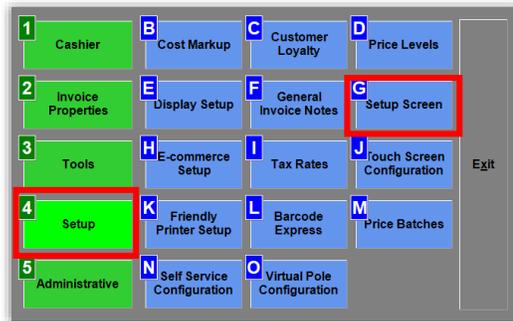


**1**   Go to the **Payment Processing** tab. Under **Payment Processor**, you should have either **PAX (TCP/IP Interface)** or **PAX (Serial Interface)**, depending on your setup.
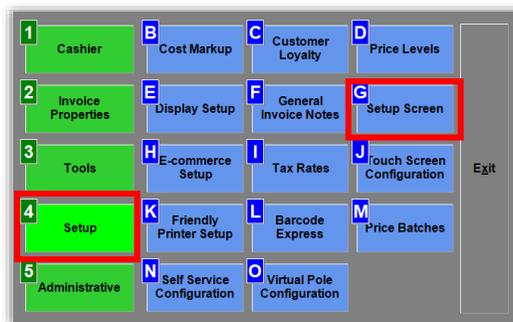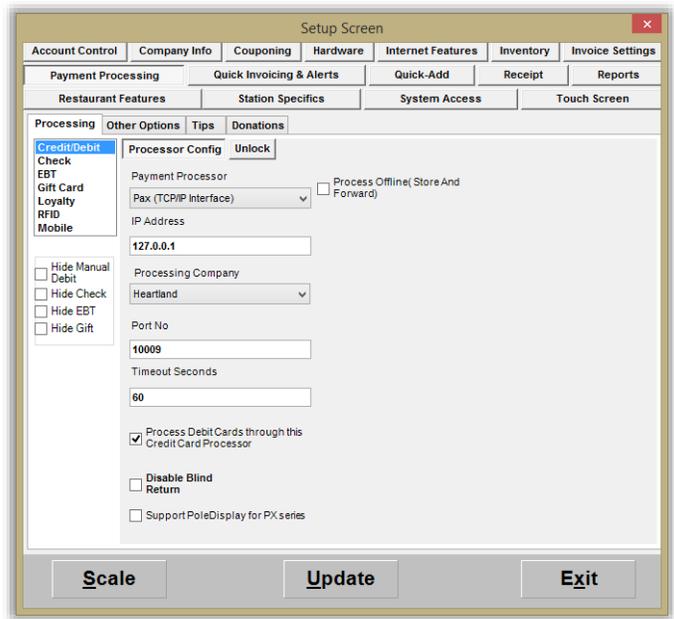


**2**   Check the **Process Offline (Store and Forward)** box and click **Update**.

**3**   Close and restart CRE at **ALL STATIONS** to effect the change.

While in offline mode, CRE will display a red banner with an offline notification and transaction count, as pictured here:



## Switch to Online

**1**   Select **Manager** or **Options** and enter credentials if prompted.

**2**   Select **Setup** | **Setup Screen**.

**3**   Go to the **Payment Processing** tab. Under **Payment Processor**, you should have either **PAX (TCP/IP Interface)** or **PAX (Serial Interface)**, depending on your setup.



**4**   Uncheck the **Process Offline (Store and Forward)** box and click **Update**.

**5**   Close and restart CRE at **ALL STATIONS** to effect the change.

As CRE processes stored transactions, it will display an orange banner indicating the status and the number of transactions as pictured here:
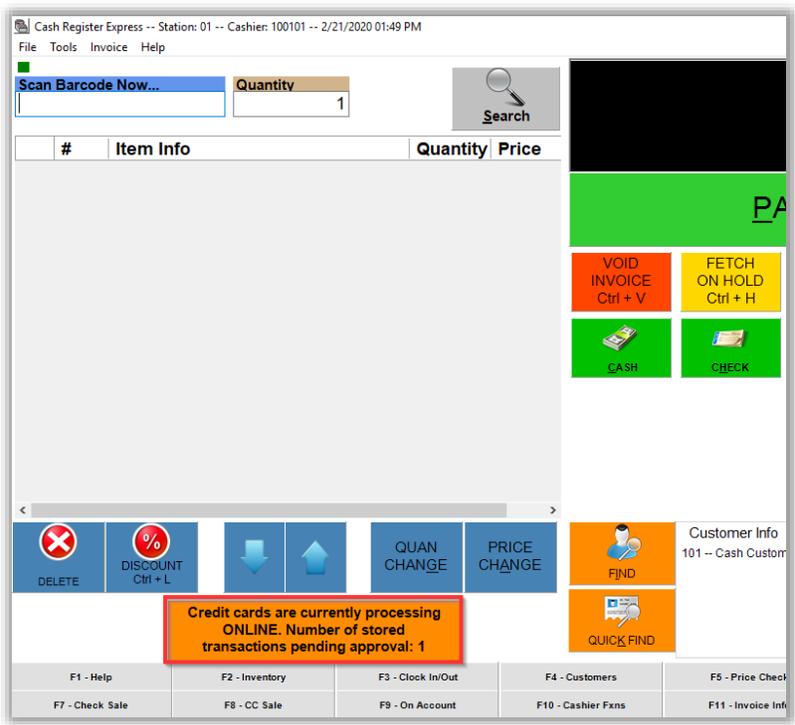
During the process, the PAX device will also display the activity, as shown here:
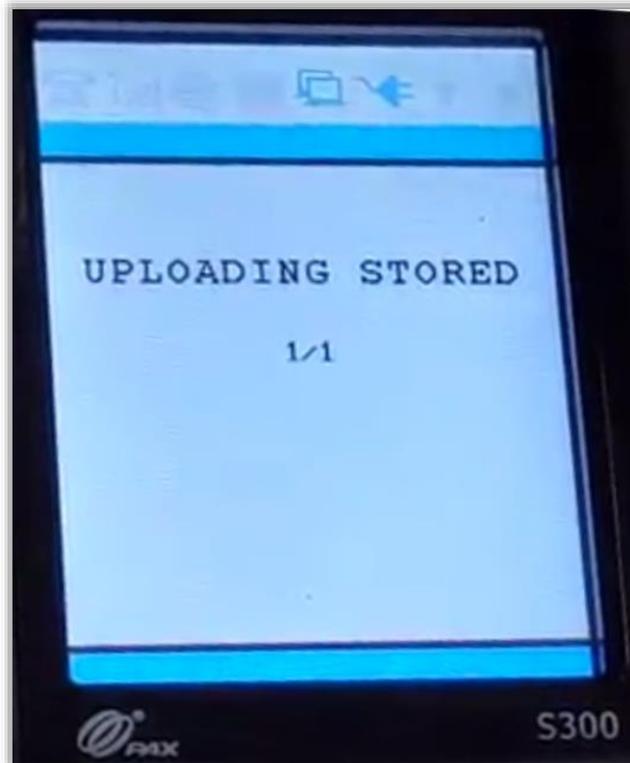


In our example, only one transaction was processed in offline mode.

# Settlement Reports and Bad Debt

As mentioned in the overview, using offline mode introduces risk of financial loss. In order to account for cases where transactions processed in offline mode are not approved when online mode is restored, CRE has added a **Bad Debt** category to reports, and it assigns this category to failed transactions. Any such amounts will be clearly reflected in settlement reports.

Here are some examples of reports that include **Bad Debt**: